

CITY OF HELENA
REQUEST FOR PROPOSAL & QUALIFICATIONS (RFP)
UTILITY BILL PRINTING & MAILING

The City of Helena (the City) invites qualified businesses (the vendor) to submit proposals for providing printing, stuffing, and mailing services for the City's utility bills at a competitive price. Written proposals using the official proposal form will be received until 5:00 P.M., MDT, March 31, 2017 at the office of the Utility Customer Services Supervisor, Room 150, 316 North Park Avenue, Helena, MT 59623.

PROCEDURAL INSTRUCTIONS

Intent

The intent of this RFP is to select one vendor to perform printing, stuffing, and mailing services for the City's utility bills.

Proposal Form

A vendor must use the attached Official Proposal Form or copies thereof in submitting a proposal. The Proposal Form must be completed in its entirety. The vendor may attach additional information, as the vendor feels is necessary.

No Proposal

If a vendor cannot meet a service requirement, then the term "No Proposal" must be entered on the Proposal Form for that specific requirement. In the case of a "No Proposal" remark, the vendor may offer an alternative equivalent service.

Multiple Proposals-Combined Bids

A vendor may submit multiple and alternative equivalent proposals for any and all of the services requested.

One or more businesses may submit a combined bid to perform these services. However, the City may also elect to award an agreement(s) to the winning vendor(s) of any or all optional services. Combined bids must be submitted under one name.

Sealed Proposals

A proposal must be submitted in a sealed envelope or package bearing the title "City of Helena Utility Printing & Mailing Services" along with the vendor's name and address. The vendor must return an original with an original signature by an individual who is authorized to make representations and commitments on behalf of the vendor. All sealed proposals should be sent to the Utility Customer Services Supervisor, Room 150, 316 North Park Avenue, Helena, MT 59623 no later than 5:00 P.M., MDT, March 31, 2017. It is the responsibility of the vendor to ensure that the proposal arrives on time at the right place. Any proposals received after the above date and time will not be accepted. Alternative proposals for an alternate equivalency for providing a particular service, or to introduce prospective services not identified herein, may be attached and clearly identified as such. However, they will not necessarily be considered in the review and evaluation process.

Public Information

All submitted proposals and information included therein or attached thereto shall become public record upon their opening by the Utility Customer Services Supervisor. Upon submission, proposals become the property of the City and will not be returned to vendors.

Responses to Vendor Questions

The Utility Customer Services Supervisor will be the only contact point and will respond only to questions in written form to clarify any matters related to this RFP. The vendor's question and the City's answer will become public record and will be shared with all vendors to whom the RFP has been sent. The City's answers will only be shared by email to ensure timeliness of distribution. If a respondent does not include their email on the line provided in the Official Proposal Form attached they will not receive a copy of questions received and the City's answers.

Right to Reject Proposals

The City reserves the right to reject any or all proposals and the right to accept or reject any item or combination of items.

Execution of Agreement

The accepted vendor will sign an agreement with the City acknowledging that the winning proposal is the contract between the two parties. Any changes to the proposal will be agreed upon by both parties, in writing.

SELECTION PROCESS

Criteria for Selection

Criteria for evaluation of proposals will be:

1. Legal and other qualifications have been met by the vendor.
2. Completeness of proposal.
3. Availability and quality of services (both basic and optional) described within this RFP.
4. Vendor's experience with other entities similar to the City of Helena.
5. Provided Criteria 1 through 4 are met, costs will be considered.

Criteria are not listed in relative order of importance.

Qualified Vendors

To be considered a qualified vendor, proposals must include satisfactory references from clients using SunGard Public Sector software. Absent this specific reference, a vendor may be required to satisfactorily prepare statements from a test file for the city's review.

Responsiveness to Criteria

All proposals from qualified vendors that are legally sufficient and complete, provide for a satisfactory service level, and indicate experience and references will be considered.

The basic required service proposal will be evaluated separately from any optional service proposal. Please make each proposal separate, so that each can be evaluated on its individual completeness and cost criteria.

CONTRACT TERMS

Contract Period

The selected vendor shall be designated as the City's utility printing, inserting, and mailing vendor for a minimum three-year period beginning August 1, 2017. A vendor may offer as an additional option a longer contract period as part of their bid. However, the City reserves the right to require a lesser period. The contract may be renewed at the sole discretion of the City Manager for an additional two years depending upon successful negotiations with the successful vendor.

Commencement of Agreement

Vendor will be expected to execute City's proposed agreement. The agreement will not be considered executed prior to the winning vendor demonstrating that they can provide the services agreed upon.

Background

The City of Helena currently prints approximately 12,300 single page utility bills each month. The bills are created on an AS400 iSeries computer using software made by a company named SunGard Public Sector. The bills are currently printed on a preformatted, 8 ½" by 11" statement with a perforated stub at the top. The City currently bills only once per month. Currently, one spooled file is generated, printed and the bills mailed at one time. The billing is done at approximately the end of the month, but can be delayed one or more days if problems occur during the billing process. The City normally mails one to two additional inserts each month with the utility bill. The number of bills can vary several hundred per month depending on the season (irrigation accounts in the summer), new accounts, requests for duplicate statements, or terminations of accounts.

The possibility does exist for multiple page statements in the future.

Required Inserts

There are inserts every month in addition to the statement, and return envelope. These could either be two cardstock (8.5" x 3.75") each, or one 8.5" x 11" folded. Currently the inserts involve city department information or nonprofit organizations requesting inserts as approved by our City Commission. These inserts are printed by the city or nonprofit organizations at their expense. The nonprofit organization chooses the company for printing the insert. Once the insert is printed they are provided to the city's utility printer for the insertion with the utility statements. If the city incurs charges to mail these inserts to a company for processing, this would be considered as an additional cost consideration during the RFP process.

OFFICIAL PROPOSAL FORM

Name of Vendor: _____

If there are any services you provide that are not specified in the proposal and you would like to offer them, please list them along with the charge on Attachment A. If a service cannot be met, then the term "no proposal" must be entered.

Please check "yes" or "no" if the service can be provided and add any additional information requested. If the space on this form is inadequate, please feel free to submit attachments identifying the subject matter by the category in bold print and the subcategory you are addressing. Put all costs for the services on Attachment A. Feel free to submit additional pages for Attachment A if more room is necessary to show all costs. The City reserves the right to reject any proposal where the total cost per mailed envelope cannot be easily determined.

Print File Transfer from City to Vendor:

The utility bills are spooled on an AS400 iSeries computer. The City can transfer the spooled file to the vendor using any acceptable method the vendor wishes to propose (email, FTP transfer, etc). The City will take into account cost to the City, and the City's ability to perform the type of transfer proposed, when judging proposals. The City's preferred method would be to use TCP/FTP (vendor must be able to accept FTP transfer) or a file transfer (upload) to a website. The City can also download the spooled file to a PC in an ASCII format (or other available formats) and use data compression for transfer by FTP or e-mail.

YES

NO

Can you accept FTP transfer?

Do you accept website transfers?

If not, what method(s) of transfer do you propose for the City's spooled file?

What format would the information need to be in (IE. ASCII), if FTP transfer is not used?

Printing Statements:

The City uses a standard format for all its bills (see attached). The City would prefer the vendor use this format when printing, but will consider alternate proposals. The vendor may use either preprinted statements or may create the format during printing. All information contained in the transferred file must appear correctly on final statements. Printed text must line up within the boxes as shown on the attached sample statement. Variance outside of the preprinted boxes will not be acceptable, as this will affect readability by the customer.

The statement must have a perforated return section at the top for the customer to return with their payment. The City may also use an optical character reader (OCR) to scan in the return stub. OCR-A is the type of print used. The return portion must be printed in OCR-A by the vendor. The statements must be printed on 24 bond paper minimum.

Which type of statements will you use?

Preprinted _____

Created During Printing _____

If preprinted, will the vendor purchase them?

Yes _____

No _____

If created, do you offer different types of colors?

Yes _____

If so, how many colors are available and is there an additional cost for multiple colors?

No, Only Black & White _____

In the printing process are you able to "BOLD" print a specified field?

Yes _____

No _____

If "yes" would there be an extra charge for this?

Yes _____

No _____

Can you print OCR-A on the statement?

Yes _____

No _____

Will you meet all requirements listed above?

Yes _____

No _____

If not, please explain:

Inserting:

The City inserts the statements into a standard #10 window envelope along with a standard #9 return envelope. The return envelope is preprinted with the Water Accounting Division's address. The City normally has one to two additional inserts per month to be mailed with the statements.

Will you provide the envelopes?

Yes _____

No _____

Can you insert the statement and return envelope for mailing?

Yes _____

No _____

Can you insert multiple page statements?

Yes _____

No _____

How many pages can you insert in a single envelope? _____

How many pages can you insert in a single envelope without additional postage? _____

Can you insert additional mailers?

Yes _____

No _____

How many additional mailers can you insert per month without incurring additional postage? _____

What sizes can the additional mailer(s) be (IE. statement, postcard, etc.)?

Can you fold all types of inserts listed above during the insert process?

Yes ☐

No ☐

If not, what type of fold would be necessary for inserting (IE. C-fold, Z-fold, etc.)?

Does the vendor have the ability to change the format if the City requests it? Example:
Moving the payment stub to the bottom of the statement instead of the top.

Yes ☐

No ☐

Mailing:

The vendor must be able to print and mail the bills within 3 City working days of receiving the electronic file. The mailed statements must be sent first class with bar-coding, and be CASS, PAVE, and NCOA certified, as well as MERLIN compliant. The vendor must use the U.S. Post Office endorsement "TEMP-RETURN SERVICE REQUESTED". The City's software currently sorts the spooled file by customer number.

Can you mail the bills within 3 working days?

Yes _____

No _____

If not, how many days do you propose? _____

Will you agree to use 1st Class postage for all bills mailed?

Yes _____

No _____

Are you able to mail statements weighing more than 1 ounce without additional costs other than postage, and stuffer fees already charged?

Yes _____

No _____

Will you agree to use the endorsement listed above?

Yes _____

No _____

Are your mailings MERLIN compliant?

Yes _____

No _____

Can you bar code, sort, CASS, PAVE, or NCOA certify the letters?

Yes _____

No _____

If yes, list your mailing abilities that would lower the postage costs:

Pricing:

Complete Attachment A listing all costs to provide the requested services. If a service has been offered by vendor as part of this RFP response, and a separate price is not shown on Attachment A, the cost will be considered included in other prices listed.

References:

Please indicate experience in performing this type of work, along with names and phone numbers of specific references. Also indicate any prior experience with printing statements prepared by SunGard Public Sector software clients.

Compensation:

The City shall pay for all services monthly and within 30 days of receiving an invoice detailing all allowable charges.

This proposal must be executed in the firm name or corporate name of the bidder and signed by an officer or other authorized representative.

In witness whereof, this bid proposal is executed on _____, 2017.

Business Name: _____

Address: _____

Authorized Signature

Type Name

Title

Phone Number

Email

ATTACHMENT A

The vendor must list all costs associated with the services bid upon. Any cost of services in this RFP not shown as "No Proposal", will be considered included in the amounts shown on this form.

PRICE FOR EACH ENVELOPE MAILED

PRICE PER MAILED PACKAGE

Mailed package includes standard #10 window envelope, standard #9 envelope with return mailing address printed on envelope, statement, statement printed, folded and stuffed, sealed and delivered to the post office.

FIRST-CLASS POSTAGE COSTS

The vendor can lower the postage costs considerably by using bulk mailing capabilities such as bar coding, sorting, CASS, PAVE, and NCOA certification. The vendor must show postage prices it can provide currently based on mailing capabilities of the vendor. This may be by category of mail or other, and should state what can trigger increases in postage charged to the city such as Postal mail cost increases or other.

Postage Breakdown

POSTAGE PRICE CHANGE PARAMETERS

Any changes in postage prices not listed below will not be allowed without approval by the City prior to changes being made.

ADDITIONAL INSERTS

Provide any charges for stuffing additional inserts.

Option 1:

Additional Insert #1 (8.5" x 3.75", cardstock 80#-100#) _____

Additional Insert #2 (8.5" x 3.75", cardstock 80#-100#) _____

Option 2:

Additional Insert #3 (8.5" x 11" tri-fold) _____

Note: Currently we have two 8.5" x 3.75" inserts per month. For May month end we are required by law to send a water report that is 8.5" x 11" tri-fold and do not allow other inserts. For July month end we are required by law to notify our customers of public hearing related to our rates, this is 8.5" x 11" tri-fold and do not allow other inserts for this month as well.

Size, Type, & Fold Restrictions:

CHANGES

List any charges associated with formatting changes or number of cycles

CHARGE DESCRIPTION

COST

ADDITIONAL CHARGES

List any additional costs not shown above.

CHARGE DESCRIPTION

COST

ATTACHMENT A CONTINUED:

PRICE GUARANTEE:

The prices listed above, other than postage, are guaranteed through?

_____ (Date)

If less than three years, list specific items that will be subject to change and the method you propose to negotiate changes.

ATTACHMENT A CONTINUED:

OPTIONAL ITEMS OFFERED (NOT LISTED ABOVE):

COST
